Information for IRS Approved Continuing Education Providers
Provided via conference call on December 3 - 6, 2012

Opening

- Summary of current CE Provider status as of 12/03/2012:
    - 625 IRS Approved Providers
    - 185 Providers have renewed for 2013
    - Approximately 18,000 approved programs
        - 50% are in-person, 31% are self-study, and 19% are online/group

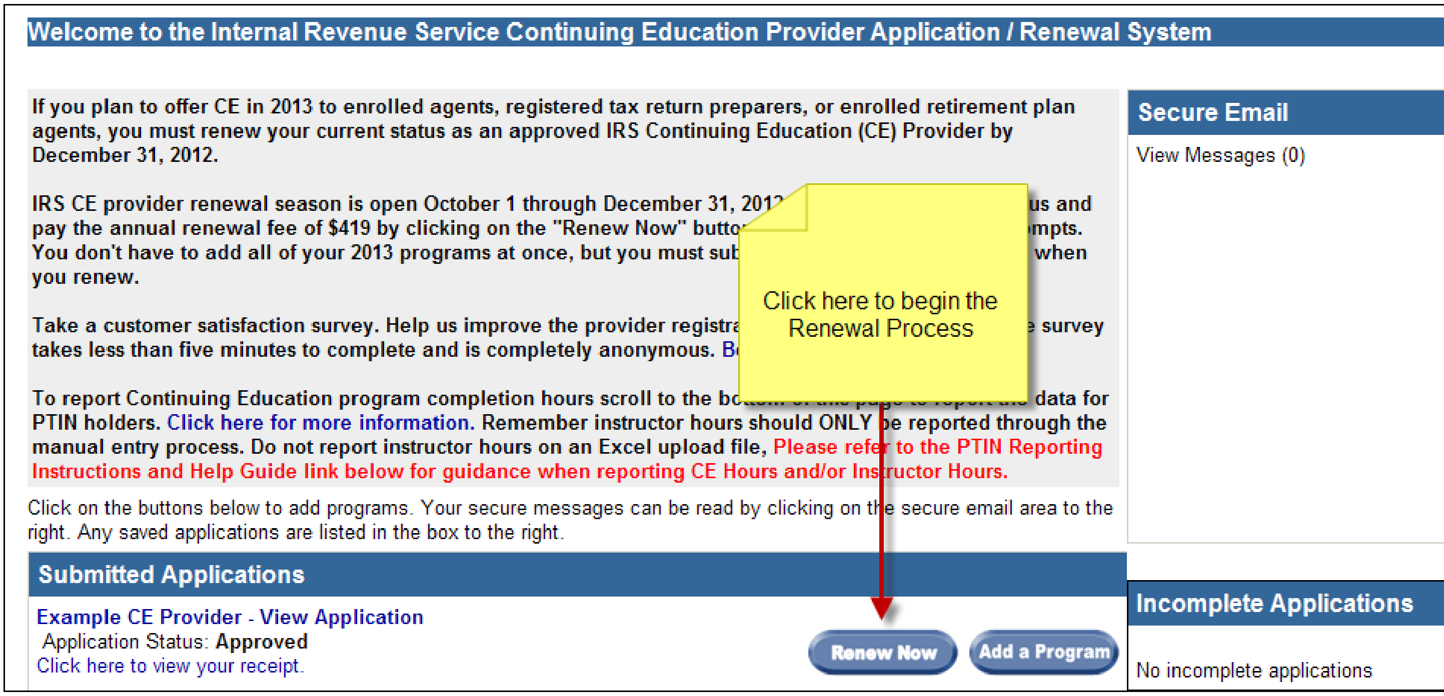
Renewals

- All providers must renew their provider status by 12/31/12
- Consequences if you fail to renew:
    - Your CE provider account being deactivated. If you are deactivated:

        1. You are no longer authorized to offer IRS CE programs
        2. You can't advertise as an IRS Approved CE Provider
        3. You can't use the IRS approved continuing education provider logo
        4. Your organization will be removed from the IRS approved CE Provider Public Listing

- **Program Numbers:** We have made some changes. The general rule for renewing programs: No content change, no need to renew that program. You will be allowed to use prior year numbers both in advertising and in PTIN reporting. You will use/submit the program number with the "12" in the middle of the program number string. The CE system will accept 2012 program numbers in 2013. However, for next year's renewal cycle, we are exploring the ability to "carry forward" your previous year program numbers by telling us exactly which programs you will continue to offer. The program numbers will not change, but we will understand which ones you will continue to use.
    - Example: Your business cycle runs from May to May and you have a 2012 program number for all of your programs. If you are offering a new program, you must add a program.This will generate a new program number with a "13" in the middle of the program number.
    - Another example: You offer a tax update program from Oct – Feb. You should continue to offer and report the same 2012 program number because the program content is the same. You will need to get a new program number in the fall of 2013 because the program content WILL change. We do NOT want generic tax update descriptions that you can move from year to year. As soon as you know the main topics that will be covered in the fall, you can get a new program number in less than 24 hours.

- In every instance, the year included in the “date of completion” will determine what year the CE credits are applied to the preparer’s CE requirement – not the year designated in the program number.
- System changes have been made that will allow PTIN data for a 2012 program completed in 2013 to be uploaded.
- You can renew in 3 ways. The method you choose to use may depend upon your business model and how you track your programs:
    1. **Renew all of your 2012 programs and carry all of them forward to 2013.** This will change all program numbers to “13” in the middle.
    2. **Renew only 1 program for 2013**. The system currently requires at least one program upon renewal. If you need to continue to use all program numbers from 2012 with no content changes, you can: (1) Pick one to renew with and then delete it later or (2) put a program “placeholder” that says something like “program for renewal purposes only”. This can be deleted later. Reminder: never delete any programs you have already administered.
    3. **Individually select any programs you would like to renew.** You can renew only those you intend to continue to offer and this will change the “13” in the middle and the rest of the program number will stay the same. Content cannot change in order to renew an existing program. If the content changes, you must “add a program”.



☐ Select All Programs

	Program	Hours	Category	Delivery Method	Target Audience
☐	**Example Ethics Program 2** ZMFWG-E-00002-12-I	2	Ethics	In Person / Online / Group	Enrolled Agents / Enrolled Retirement Plan Agents
	Your application to become an Internal Revenue Service Appro ...				
☐	**This is a test** ZMFWG-P-00005-12-O	10	Test Preparation	Online / Group / Self-study	Return Preparers
	This is a test. This is a test. This is a test. This is a t ...				
☐	**UAT Test** ZMFWG-U-00007-12-I	2	Federal Tax Law Update	In Person	Return Preparers
	I am testing the system to see if i can add a program and wh ...				

Number of new programs that would you like to add (*What is a "program"? Covering multiple subject areas in one program?*):
You will be able to add additional programs after completing this registration process by logging into your user account.

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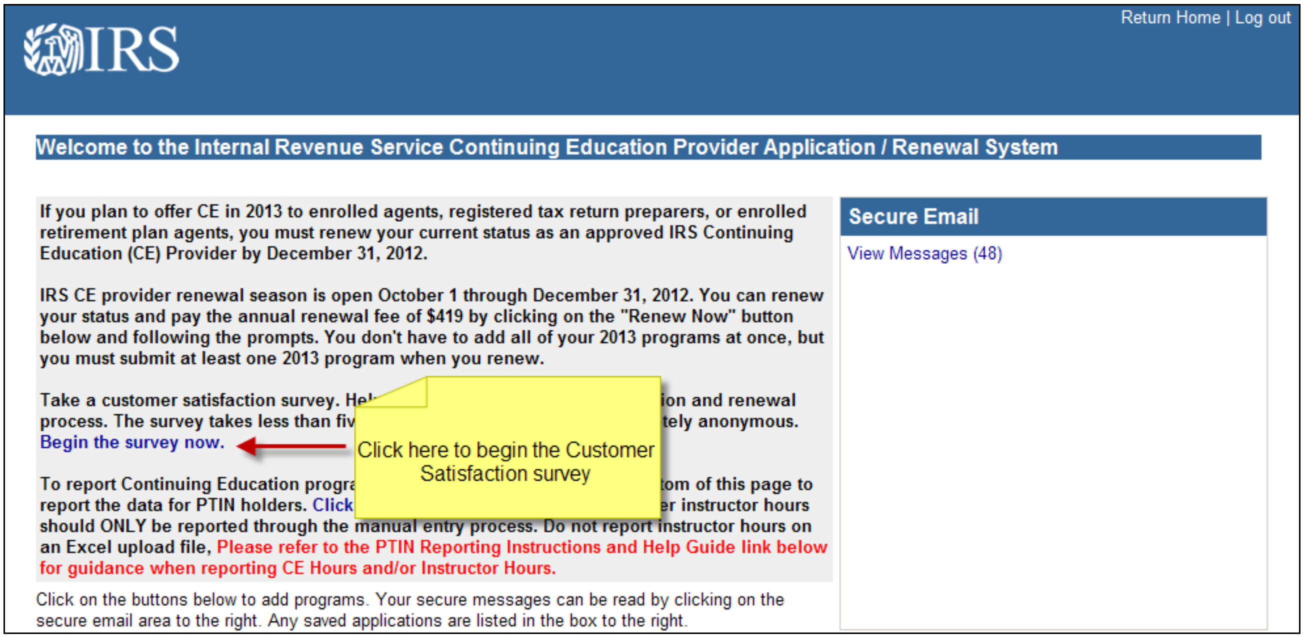
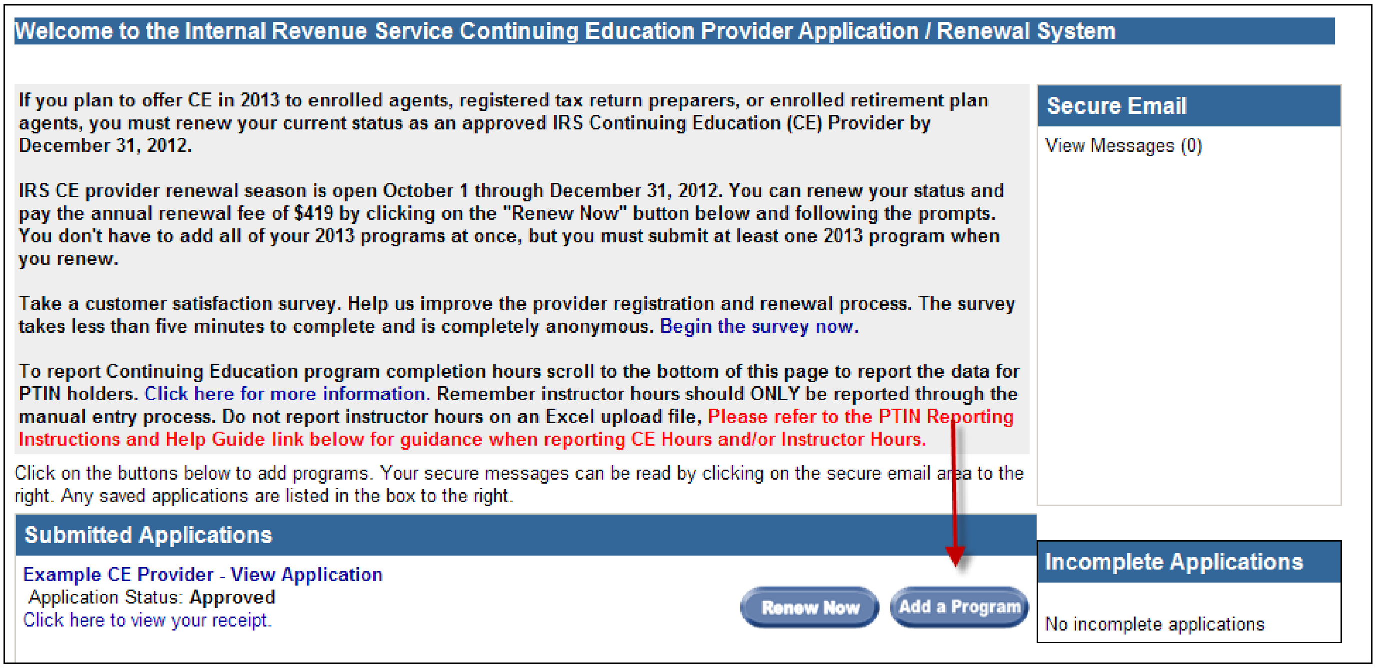
Back Save Continue >>>

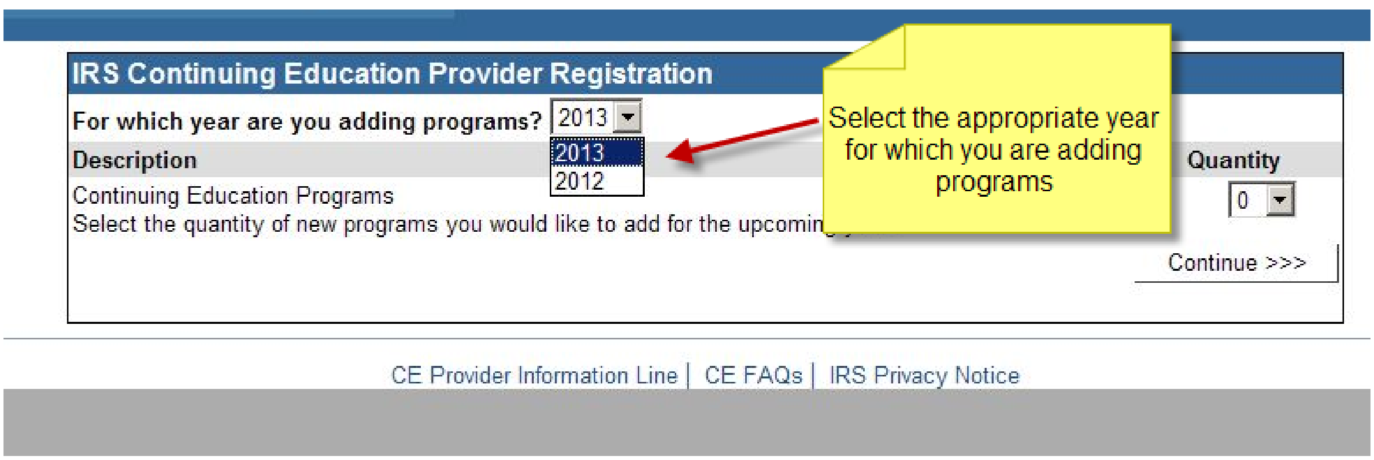
- **Customer Satisfaction Survey:** We encourage you to take the Customer Satisfaction Survey you'll see upon completion of the renewal process. If you have already completed your renewal, you can access it through a link on your provider front page.
- Samples of your program material, program syllabus, instructor bios, program exam, certificates of completion, and program evaluation forms are not required as part of the renewal process.
- 2013 programs can be presented on January 1, 2013 or thereafter. However, you can advertise any 2013 program that has been renewed or added during your renewal for 2013.



Program Information

- An EA can take RTRP CE and vice versa, as long as you have checked the box for that particular program to cover both credentials in the CE system.
- Providers who have renewed will now have programs in the CE system for both 2012 and 2013. If you are continuing to use 2012 programs, you will find them under your 2012 program link under the window display for 2013 programs.
- After providers have renewed, when adding additional programs, you will be presented with a drop down menu to select either 2012 or 2013. Please make the correct selection.





- **Program categories:** Reminder, please accurately categorize program topics (e.g., Federal Tax Law, Fed Tax Law Update, Ethics, etc).
  - Federal Tax Updates should generally deal with new tax legislation or changes to current tax laws. This also includes discussion of any IRS forms, publications, instructions, and guidance that is applicable for that piece of tax law.
  - Program titles should include a specific description of the program content. The description should also include the delivery method of the content (panel, speaker, or other method). Ethics program descriptions should include how practical application of the subject matter will be tested in real world situations (hypothetical examples or panel discussions).
- We strongly recommend that you review the sample program descriptions at www.irs.gov/taxpros/ce.

- DO NOT combine or bundle topics into one program number. For example – if you will present an 8 hour 1 day in person seminar that includes 6 hours of federal tax law and 2 hours of federal tax law update, do not bundle this presentation into one program number for 8 hours of federal tax law. You will need 2 program numbers.
- You can advertise multiple programs in one package for customers.
  - Please note the following when packaging more than program in advertising:
    1. Specify/breakout the topics that will be presented in the package and the hours of credit the participant will receive for each category/topic.
    2. Be careful what you call a package if it includes a Test Preparation program. In the example above, do not call the package a 15 hour Test Preparation program. Instead, state the 15 hour presentation will include a 10 hour Test Preparation program, a 3 hour federal tax law update program, and a 2 hour ethics program. Reminder – test preparation programs are limited to 10 hours of federal tax law.
    3. Do not mislead a participant as to what they are purchasing or deny them the appropriate credit due to bundling.

PTIN Upload Update

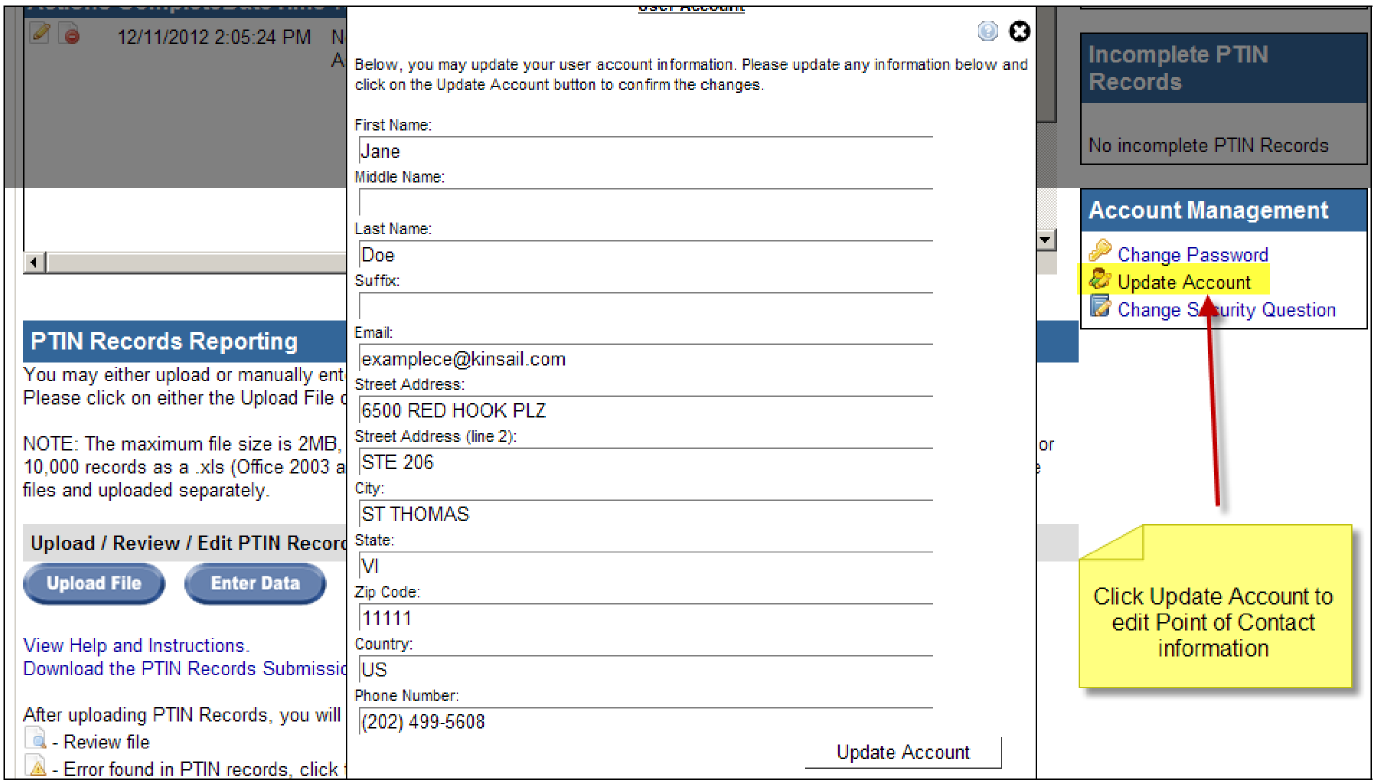
- PTIN Upload Success Status Update: as of 12/3/12, over 26,000 individual records for PTIN holders have been submitted, as well as over 4,000 files with multiple student records. We are currently at an overall success rate of approximately 85% and approximately a 60% success rate for first-time attempts.
- Who should you be reporting CE for? Anyone who has a PTIN. You do not need to worry about EA enrollment numbers or CPA license numbers - if the attendee has a PTIN, report it. If you don't, you may receive calls from preparers once the CE is displayed in the PTIN accounts later in 2013.
- Instructor credits:
  - If a preparer instructs a program and also sits through someone else instructing that same program, take the larger of the hours and report those for the preparer.
  - If a preparer is co-instructing a program, they can get instructor/preparation hours (max of 4 or 6, depending on credentials) and credit for sitting through the other instructor's presentation.
- **Letters** on PTIN responsibilities were sent to your secure email account in CEPARS on 10/21/2012. Be sure you review these.

Hot Topics

- Public listing: The public listing now changes the order of display for provider names every 15 minutes.

- CE display for preparers: Preparers will not see any CE displayed in their PTIN holder accounts until later in 2013. Preparer credits will be displayed in the PTIN holders account only.

- Update your contact information: If your point of contact changes please ensure you update your provider account.



- Test Preparation Programs: We recently changed our policy regarding test prep programs. Effective immediately, provisional PTIN holders and RTRPs may receive CE credit for RTRP competency test preparation programs **and** Special Enrollment Examination Test Preparation programs. This will be retroactive to the beginning of 2012 (currently the FAQ regarding this is being updated). The content of these test preparation programs must focus on federal tax law and a maximum of 10 hours may be credited to satisfy the annual federal tax law CE requirement. As before, enrolled agents may not receive CE credit for Special Enrollment Examination preparation programs or RTRP competency test preparation programs. NOTE: If you have offered any SEE Examination Test Preparation programs to RTRP or RTRP candidates at any time during 2012, you must obtain a program number for no more than 10 hours (use category for test preparation) and provide Certificates of Completion for anyone you are giving the credit. You can then report the information to the IRS by using the PTIN upload capability in your CE provider account.
- Renewal: The CE staff is currently reaching out to providers who have recently renewed. Our goal is to partner with you to ensure that your programs meet the standards to qualify for CE credit based upon your program descriptions. If you receive a call from a Continuing

Education staff member, please make every effort to return the call as soon as possible so we may correct any inaccuracies before 2013.

- Do you sell program material? If you are an IRS approved provider who also sells program material to other providers, we would like to talk to you to learn more about your business model. The information you provide will help us assist your buyers during the registration process to become IRS approved providers. Please send us an email at rpo.ce@irs.gov identifying who to contact so we can plan to hold a conference call with sellers of program material.
- Secure Mailbox Enhancements: Some of you have inquired about the emails in your secure email account. We are working with the vendor to allow you to sort your emails by date to assist you in viewing your emails in an organized fashion. We hope to have this issue resolved soon. We will also assess what we can delete.
- Credit Carryover: Excess CE hours may not be carried over from year to year. The 15 hours is an ANNUAL requirement.

Closing

- Please send any feedback or other questions to rpo.ce@irs.gov